SYMPLECTIC
ELEMENTS

Version 4
User Guide

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1. What is Elements?

Symplectic Elements is a leading Research Information Management system used by universities around the world.

A range of data sources

Elements searches a growing number of well-known journal databases to bring in papers published by researchers:

- arXiv
- CiNii
- CrossRef
- dblp
- figshare
- Google Books
- Mendeley
- PubMed
- RePEc
- SciVal
- Scopus
- Web Of Science

Automated entry

Symplectic Elements makes keeping your records up to date easier by downloading publications and other activities from a range of online databases.

You simply need to claim these for your records when you receive an automatic e-mail alerting you to new publications.

Aspects of research

Symplectic Elements manages different aspects of research:

- Publications
- Grants
- Professional Activities
- Projects
- Equipment

The different aspects can then be linked to each other and to other users within your academic institution.

Your records in one place

Symplectic Elements may be integrated with a number of other information systems within your institution, including grant application software, your personal web page and your institution's digital repository.

If you are too busy

You can delegate the rights to edit your records to an assistant or other member of staff.

Simply log into the system and click on **Account Settings** in the header menu, then add the appropriate delegate(s).

Browsers

Symplectic Elements is compatible with modern browsers:

- Firefox
- Chrome
- Internet Explorer (8 and above)
- Safari

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2. Navigating Elements

2.1 HOME

Once you have logged into *Elements*, you will see the home screen, which contains various widgets depending on your institution's licence and module configuration.

Notice of pending publications.

My Publications: claimed/ pending publications by type and relationship.

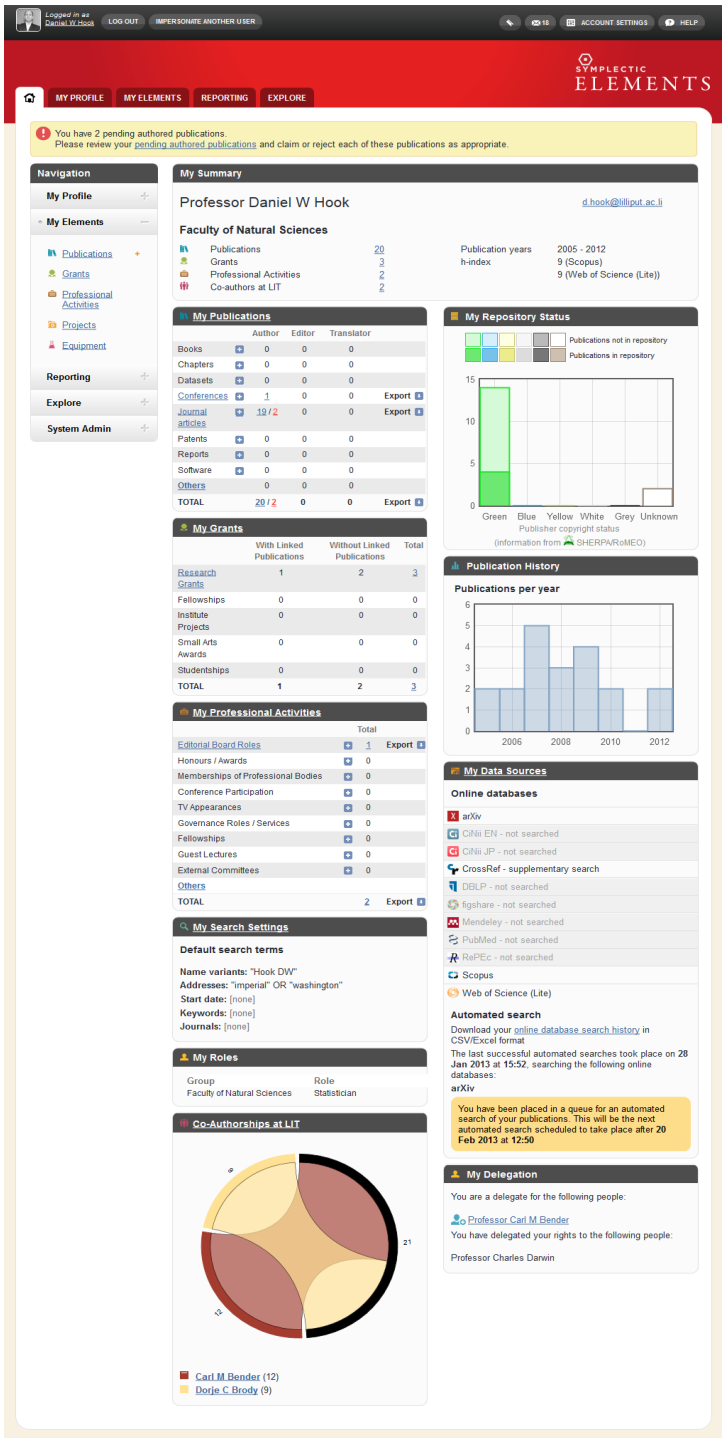
My Grants: a summary of your grants and linked publications.

My Professional Activities: a summary of your professional activities.

My Search Settings: the terms currently used to search the online data sources.

My Roles: list of the roles you have in Elements.

Co-Authorships at Organisation: a visual representation and a list of co-authors within your institution.



My Summary: a summary of your academic profile in Elements.

My Repository Status: a breakdown of your deposited publications.

Publication History: a bar chart showing publications per year.

My Data Sources: the online data sources that are currently searched. Details of the most recent and the next searches.

My Delegation: Anyone to whom you have delegated rights to help with your records; or have chosen you as a delegate.

2.2 MENUS

Three complimentary menus makes navigating *Elements* easy and informative.

Persistent header

The black header at the top of *Elements* persists on all pages. It shows who is logged in (and who is being impersonated), it contains links to:

- Workspace
- Inbox
- Account Settings
- Help

Area tabs

The main areas in *Elements* are easily accessed via the tabs:

- Home
- My Profile
- My Elements
- Reporting (depending on role)
- Explore

Sitemap

The *Elements* sitemap will be expanded according to the area that is accessed and will always reflect where you are in the system.

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3. My Profile

Click on **My Profile** to see a summary of your details, and other useful information. The information shown in your profile includes:

- Your profile photo
- Your name
- Your Primary group (e.g. your faculty)
- Your e-mail address
- Your links
- Your *h*-index (only visible to you)

This data is also available to other users of *Elements*, who can view your profile but can't see the *h*-index information.

Co-authors

Any co-authors you may have at your institution will be listed on the left-hand side, showing the number of publications you have in common.

Publications

Your publications are listed and grouped into **Most Recent**, **Favourites** and **All**.

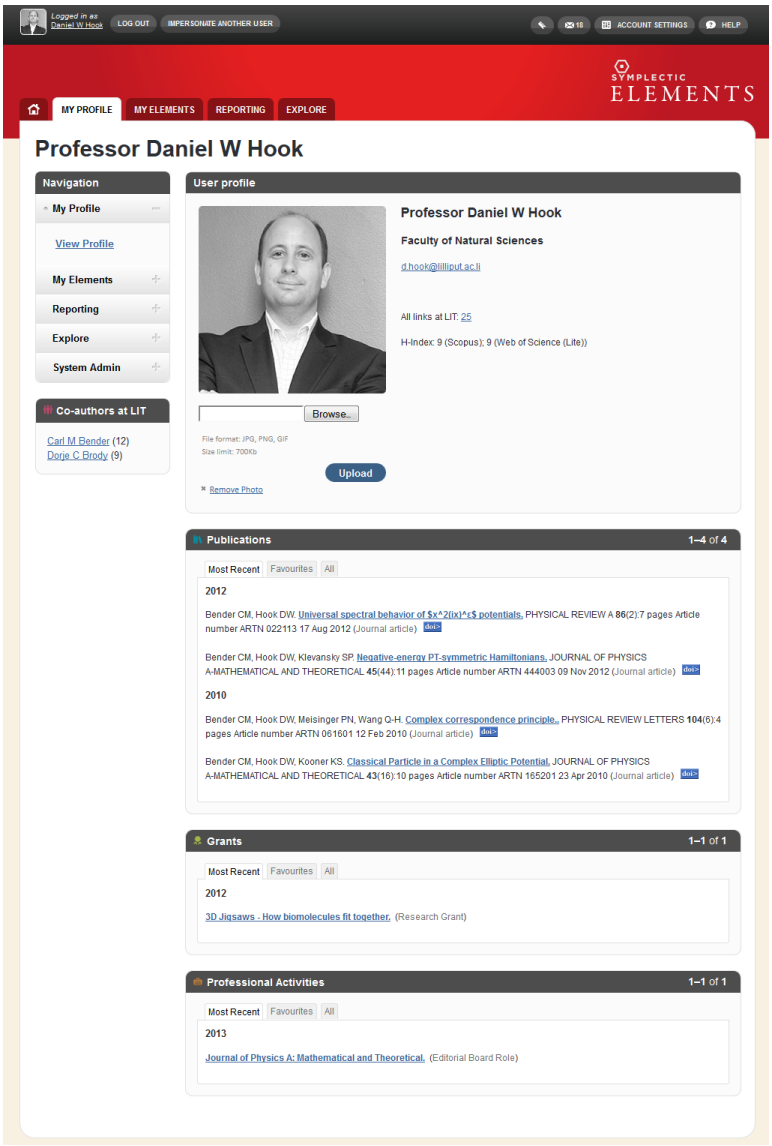
Grants

Your grants are listed and grouped into **Most Recent**, **Favourites** and **All**.

Professional Activities

Your professional activities are listed and grouped into **Most Recent**, **Favourites** and **All**.

To request changes to your e-mail address or primary group, contact your *Elements* administrator or the contact person listed under **Help**.

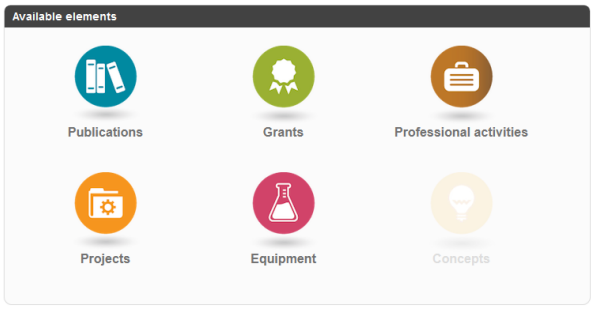

Logged in as Daniel W Hook
LOG OUT
IMPERSONATE ANOTHER USER
ACCOUNT SETTINGS
HELP
SYMPLECTIC ELEMENTS
MY PROFILE
MY ELEMENTS
REPORTING
EXPLORE
Professor Daniel W Hook
Navigation
My Profile
View Profile
My Elements
Reporting
Explore
System Admin
Co-authors at LIT
Carl M Bender (12)
Dorje C Brody (9)
User profile
Professor Daniel W Hook
Faculty of Natural Sciences
d.hook@lilliput.ac.li
All links at LIT: 25
H-Index: 9 (Scopus); 9 (Web of Science (Lite))
Browse...
File format: JPG, PNG, GIF
Size limit: 700Kb
Upload
Remove Photo
Publications 1–4 of 4
Most Recent Favourites All
2012
Bender CM, Hook DW, Universal spectral behavior of $x^2(ix)^ε$ potentials, PHYSICAL REVIEW A 86(2):7 pages Article number ARTN 022113 17 Aug 2012 (Journal article)
Bender CM, Hook DW, Klevansky SP, Negative-energy PT-symmetric Hamiltonians, JOURNAL OF PHYSICS A-MATHEMATICAL AND THEORETICAL 45(44):11 pages Article number ARTN 444003 09 Nov 2012 (Journal article)
2010
Bender CM, Hook DW, Meisinger PN, Wang Q-H, Complex correspondence principle., PHYSICAL REVIEW LETTERS 104(6):4 pages Article number ARTN 061601 12 Feb 2010 (Journal article)
Bender CM, Hook DW, Kooner KS, Classical Particle in a Complex Elliptic Potential, JOURNAL OF PHYSICS A-MATHEMATICAL AND THEORETICAL 43(16):10 pages Article number ARTN 165201 23 Apr 2010 (Journal article)
Grants 1–1 of 1
Most Recent Favourites All
2012
3D Jigsaws - How biomolecules fit together. (Research Grant)
Professional Activities 1–1 of 1
Most Recent Favourites All
2013
Journal of Physics A: Mathematical and Theoretical. (Editorial Board Role)

4. My Elements

Elements is designed to let you easily manage the different aspects of your research - these aspects are the system elements:

- Publications
- Grants
- Professional Activities
- Projects
- Equipment

Depending on your institution's licence and module configuration, you should see some or all of the following under **My Elements**:



Publications

Elements searches a number of online databases and downloads bibliographic details of your publications automatically. Publications found in more than one database are disambiguated by *Elements* and are added as separate *records* on the same publication.

Elements allows you to add manual records, to compliment existing publications or for publications that are not found in the online databases.

New searches take place periodically, and *Elements* notifies you via e-mail when it finds new publications for you to **claim** or **reject**.

Grants

Elements allows you to capture (either through manual data input or from another institutional system) grant related metadata.

Once captured, this data can be linked to other elements captured in *Elements* (such as users, publications, equipment), can be displayed in your profile, reported on and made available to external systems.

Professional activities

Elements allows you to capture (through manual data input) different aspects of your professional profile - for example, external collaborations, journal editorships or any fellowships that they might hold.

Once captured, this data can be linked to other elements captured in *Elements* (such as users, publications, equipment), can be displayed in your profile, reported on and made available to external systems.
The categories used by your institution may include activities such as:

- Awards
- External collaborations
- External committees
- Fellowships
- Membership of professional bodies
- Guest lectures
- Industrial connections
- Editorial boards
- Commercial spinoffs

Projects

Elements allows you to capture (either through manual data input or from another institutional system) project related metadata.

Once captured, this data can be linked to other elements captured in *Elements* (such as users, publications, equipment), can be displayed in your profile, reported on and made available to external systems.

Equipment

Elements allows you to capture (either through manual data input or from another institutional system) equipment related metadata.

Once captured, this data can be linked to other elements captured in *Elements* (such as users, publications, equipment), can be displayed in your profile, reported on and made available to external systems.

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5. Managing your Publications

Publications in *Elements* are either discovered in online sources or added manually.

5.1 PUBLICATION SUMMARY

Your publications are grouped into three areas, which are accessed via the tabs named:

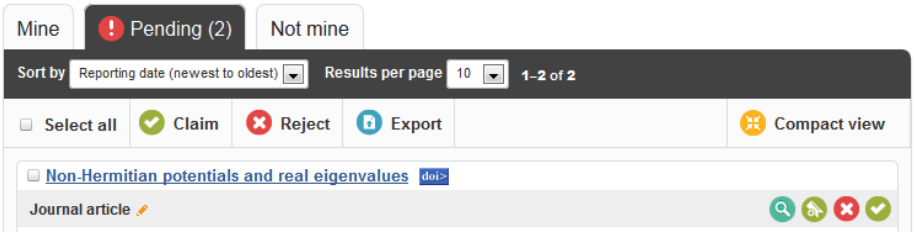
- **Mine:** found online and claimed, or manually added
- **Pending**: found online and not yet claimed
- **Not mine**: found online and rejected

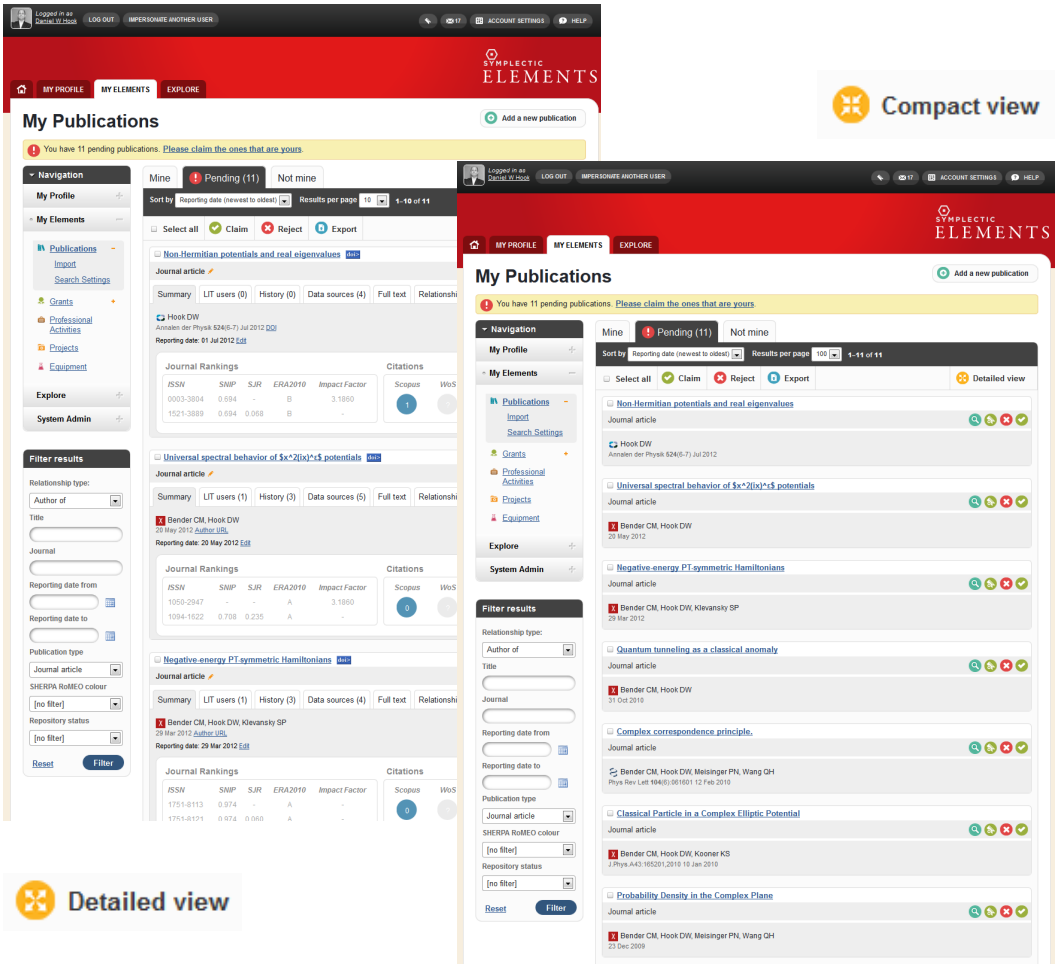
5.2 PENDING PUBLICATIONS

Elements will e-mail you when publications in the online sources are found to match your search settings. These publications are added to the **Pending** area in the **Publications** element.

To **claim** a publication, and move it to the **Mine** area, click on the green tick.

To **reject** a publication, and move it to the **Not mine** area, click on the red cross.





5.3 SUMMARY VIEW OF PUBLICATIONS

The summary view of each publication includes pertinent bibliographic detail, DOI link, Publication type (e.g. Conference, Journal Article) and Reporting date(s).

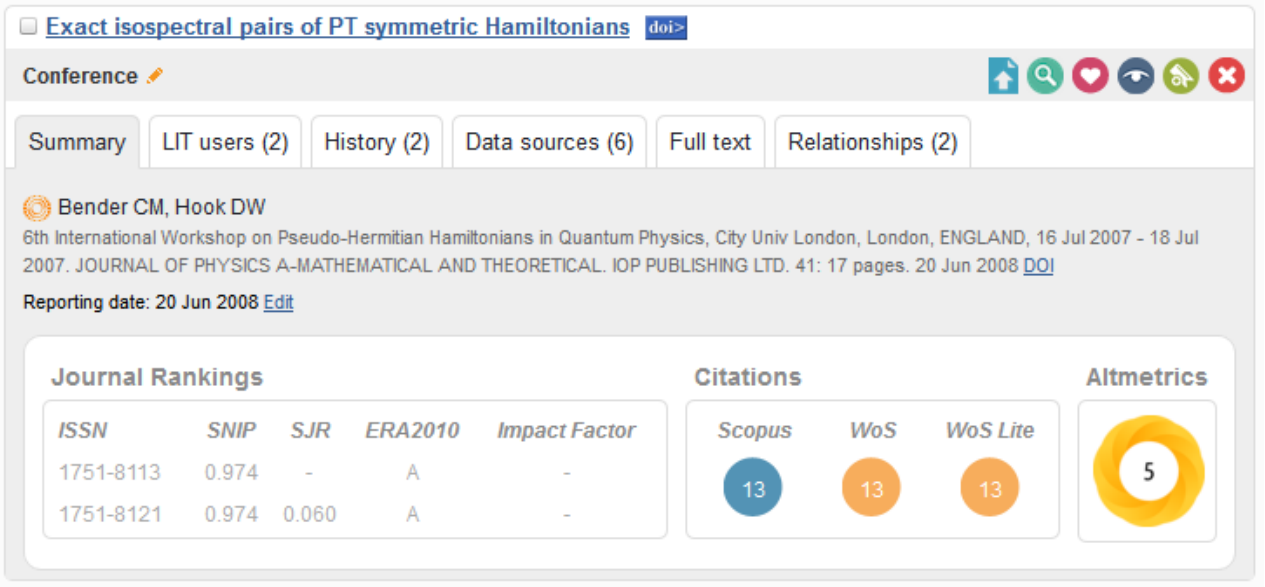
If present, bibliometric data for the publication is displayed:

- Journal Rankings
- Citations
- Altmetrics

Actions

Once a publication has been claimed, the following actions are available on the summary level:

Upload file
View full details
Make favourite
Hide publication
Add to workspace
Reject publication


Exact isospectral pairs of PT symmetric Hamiltonians
doi>
Conference
Summary
LIT users (2)
History (2)
Data sources (6)
Full text
Relationships (2)
Bender CM, Hook DW
6th International Workshop on Pseudo-Hermitian Hamiltonians in Quantum Physics, City Univ London, London, ENGLAND, 16 Jul 2007 - 18 Jul 2007. JOURNAL OF PHYSICS A-MATHEMATICAL AND THEORETICAL. IOP PUBLISHING LTD. 41: 17 pages. 20 Jun 2008 DOI
Reporting date: 20 Jun 2008 Edit
Journal Rankings
ISSN SNIP SJR ERA2010 Impact Factor
1751-8113 0.974 - A -
1751-8121 0.974 0.060 A -
Citations
Scopus WoS WoS Lite
13 13 13
Altmetrics
5

Publication tabs

The summary view of publications:

- **Summary**
- **[Institution] users:** list of (institution) users associated with the publication
- **History:** log of all changes made to the publication
- **Data sources**: lists the records that exists for the publication
- **Full text:** lists institutional repository files that are associated with the publication.
- **Relationships:** list of relationships the publication has to other elements and users..

Journal Rankings

Depending on the configuration of *Elements*, various journal ranking will be displayed against the ISSNs of the publication.

Citations

Depending on the configuration of *Elements*, publication citation counts from *Scopus*, *Web of Science* and *Web of Science Lite* are displayed.

Altmetrics

The Altmetric score reflects the online attention that a publication has received. For further details go to altmetric.com

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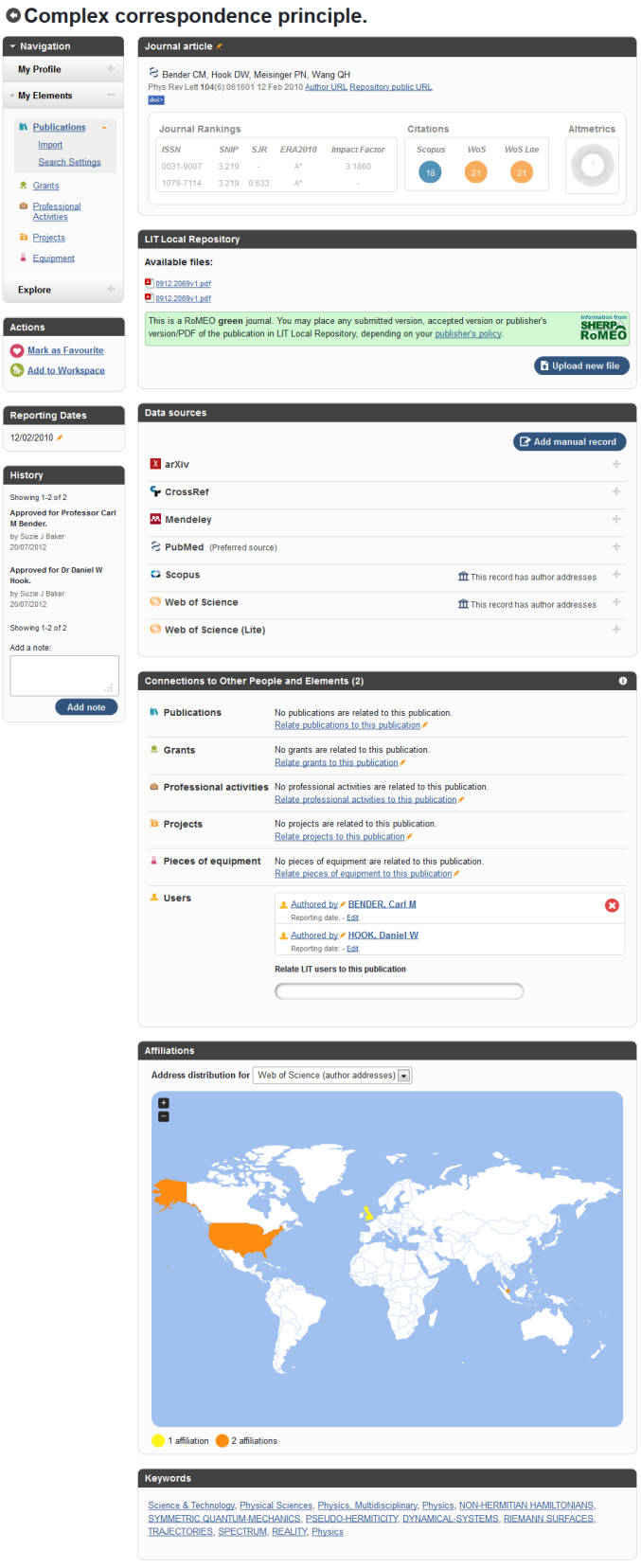
5.4 FULL DETAIL VIEW OF PUBLICATIONS

The full detail view of a publication contains the full bibliographic detail. It is reached by selecting **View full details** in the summary view, or by clicking the title of a publication wherever it is found in *Elements.* From here you can **Upload new file** to the repository, **Add manual record** to the publication and **Relate** other elements to the publication.

Actions: mark as favourite or add to workspace.

Reporting Dates: the dates set against the publication for reporting purposes.

History: a log of all changes made to the publication.


Complex correspondence principle.
Navigation
My Profile
My Elements
Publications
Import
Search Settings
Grants
Professional Activities
Projects
Equipment
Explore
Actions
Mark as Favourite
Add to Workspace
Reporting Dates
12/02/2010
History
Showing 1-2 of 2
Approved for Professor Carl M Bender.
by Suzie J Baker
20/07/2012
Approved for Dr Daniel W Hook.
by Suzie J Baker
20/07/2012
Showing 1-2 of 2
Add a note:
Add note
Journal article
Bender CM, Hook DW, Meisinger PN, Wang QH
Phys Rev Lett 104(6):061601 12 Feb 2010 Author URL Repository public URL
Journal Rankings
Citations
Altmetrics
ISSN SNIP SJR ERA2010 Impact Factor
Scopus WoS WoS Lite
0031-9007 3.219 - A* 3.1860
1079-7114 3.219 0.633 A* -
LIT Local Repository
Available files:
0912.2069v1.pdf
0912.2069v1.pdf
This is a RoMEO green journal. You may place any submitted version, accepted version or publisher's version/PDF of the publication in LIT Local Repository, depending on your publisher's policy.
Upload new file
Data sources
Add manual record
arXiv
CrossRef
Mendeley
PubMed (Preferred source)
Scopus This record has author addresses
Web of Science This record has author addresses
Web of Science (Lite)
Connections to Other People and Elements (2)
Publications No publications are related to this publication.
Relate publications to this publication
Grants No grants are related to this publication.
Relate grants to this publication
Professional activities No professional activities are related to this publication.
Relate professional activities to this publication
Projects No projects are related to this publication.
Relate projects to this publication
Pieces of equipment No pieces of equipment are related to this publication.
Relate pieces of equipment to this publication
Users
Authored by BENDER, Carl M
Reporting date: - Edit
Authored by HOOK, Daniel W
Reporting date: - Edit
Relate LIT users to this publication
Affiliations
Address distribution for Web of Science (author addresses)
1 affiliation 2 affiliations
Keywords
Science & Technology, Physical Sciences, Physics, Multidisciplinary, Physics, NON-HERMITIAN HAMILTONIANS, SYMMETRIC QUANTUM-MECHANICS, PSEUDO-HERMITICITY, DYNAMICAL-SYSTEMS, RIEMANN SURFACES, TRAJECTORIES, SPECTRUM, REALITY, Physics

Summary: a summary of the publication's bibliographic and bibliometric details.

Repository: links to any files deposited to local repository for this publication, and journal copyright advice, if available.

Data sources: the full bibliographic detail by source.

Connections: details of users and elements linked to the publication.

Affiliations: a map showing the address distribution for affiliated authors.

5.5 ADD A MANUAL RECORD

Manual records can be added to existing publications.

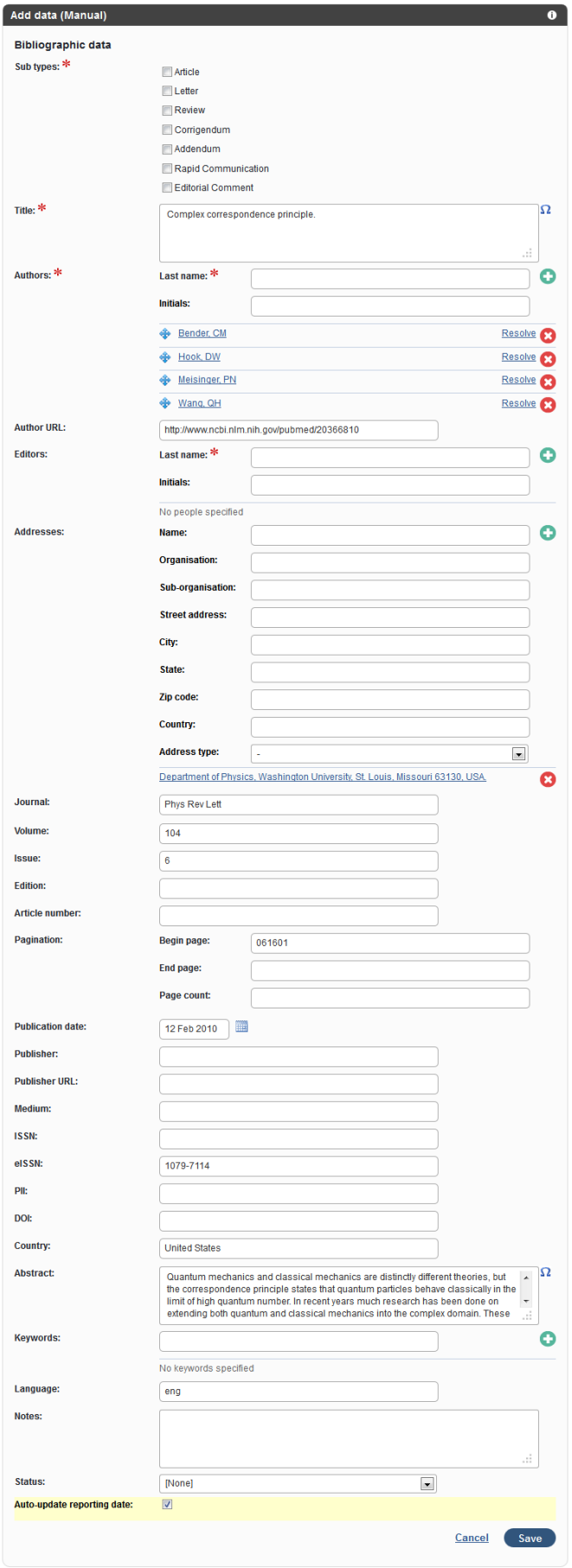
Some online publication records may be incomplete when first created, or may contain mistakes.

To ensure the correct details are shown in your publications list, you can create a manual entry within a publication record, and make corrections to this.

To add a manual entry to a record, click on **Add manual record** in the **Data sources** section in the full detail view of the publication. A manual record will appear, populated initially with the details from the preferred online database.

Edit the details in this screen, and then click on ‘save’.

To complete the process, after saving the new details, make the manual details the ‘preferred source’.



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5.6 ADD A NEW PUBLICATION

New publications can be added via the plus buttons on the home page and on the Publications screen.

A screen equivalent to the one for a manual record (see 5.5) is opened. As there are no existing records for this publication, only the Relationship type and the Authors (you) is set.

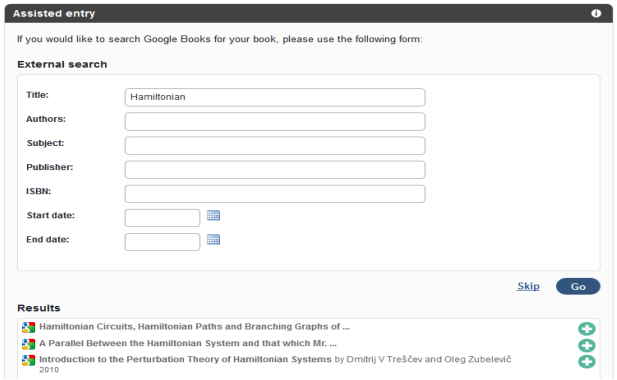
Make sure you click on ‘save’ when you have completed all the fields.

Assisted Entry

The *Google Books* and the *CrossRef* databases hold records on many published works, and the *Elements* system can be used to pull in these details to fill a new record automatically.

Add books and chapters from Google

When you click the plus button on the home page to add a new book or chapter, you will be taken to the assisted entry screen where you can enter search terms and retrieve results details from Google’s book database.



Results will be shown at the bottom of the screen. Click on the arrow next to the correct book title (if it is found) to create a new manual book record filled with the details obtained from Google. You can add any information that is missing and, finally, click on ‘save’ to complete the process.

Add journal articles from CrossRef

When you click on the plus button on the home page to add a new journal article, you will be taken to the assisted entry screen where you can enter a DOI and retrieve results details from CrossRef’s database.

Assisted entry
If you would like to search CrossRef for your journal article, please use the following form:
External search
DOI:
10.1103/PhysRevLett.104.061601
Skip
Go
Results
Complex Correspondence Principle by Bender CM, Hook DW, Meisinger PN and Wang Q
Feb 2010

Results will be shown at the bottom of the screen. Click on the plus button next to the correct journal article (if it is found) to create a new journal article record with source set to CrossRef.

The new record will be added in an approved state and you will not able to modify the bibliographic content.

Skipping assisted entry

Assisted entry can be skipped before and after a search by clicking on ‘skip’ button. This will take you straight to the ‘manual entry’ screen.

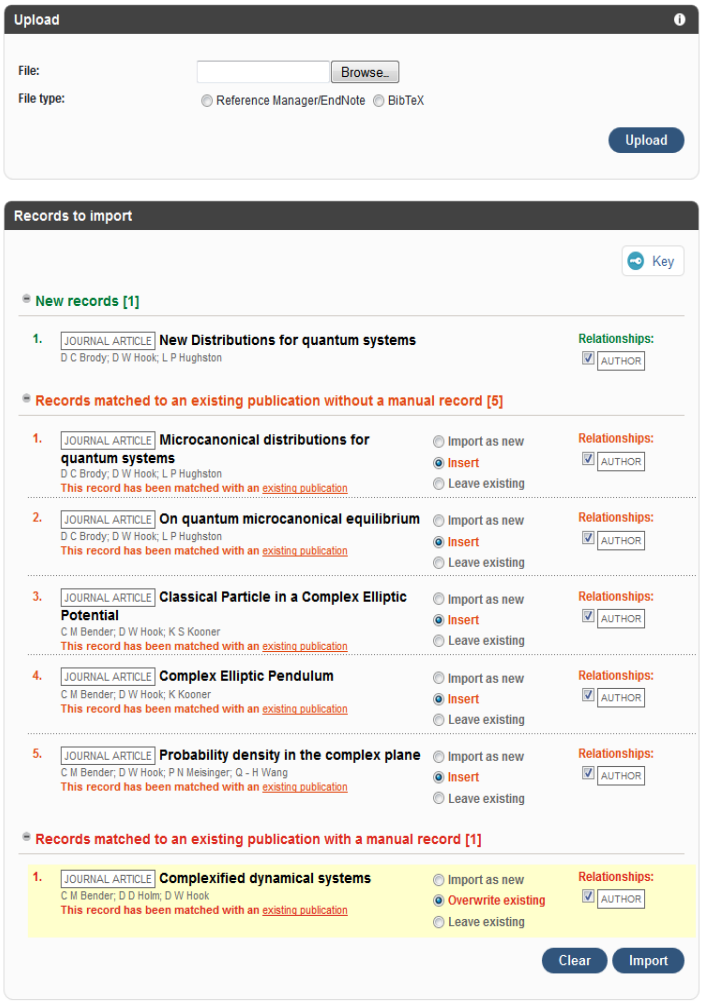
5.7 IMPORTING PUBLICATIONS

To help you build a complete publication set, particularly for publications not found in the online databases, you can import records in formats used by reference management programs, such as *Reference Manager*, *EndNote* or *BibTeX*.

To do this, first export the data for a particular type of publication (e.g. book chapters) from the relevant application. This should be in the RIS or BibTeX format. Store this file within your computer's filing system.

Then, choose **Import** under **Publications** from the **My Elements** menu. Browse for the file you have saved and then click on 'upload'.

The system will compare the new records with your current publications list (including any declined publications) and will generate a list showing the new records and any matches.


Upload
File:
Browse...
File type:
Reference Manager/EndNote
BibTeX
Upload
Records to import
Key
New records [1]
1. JOURNAL ARTICLE New Distributions for quantum systems
D C Brody; D W Hook; L P Hughston
Relationships:
AUTHOR
Records matched to an existing publication without a manual record [5]
1. JOURNAL ARTICLE Microcanonical distributions for quantum systems
D C Brody; D W Hook; L P Hughston
This record has been matched with an existing publication
Import as new
Insert
Leave existing
Relationships:
AUTHOR
2. JOURNAL ARTICLE On quantum microcanonical equilibrium
D C Brody; D W Hook; L P Hughston
This record has been matched with an existing publication
Import as new
Insert
Leave existing
Relationships:
AUTHOR
3. JOURNAL ARTICLE Classical Particle in a Complex Elliptic Potential
C M Bender; D W Hook; K S Kooner
This record has been matched with an existing publication
Import as new
Insert
Leave existing
Relationships:
AUTHOR
4. JOURNAL ARTICLE Complex Elliptic Pendulum
C M Bender; D W Hook; K Kooner
This record has been matched with an existing publication
Import as new
Insert
Leave existing
Relationships:
AUTHOR
5. JOURNAL ARTICLE Probability density in the complex plane
C M Bender; D W Hook; P N Meisinger; Q - H Wang
This record has been matched with an existing publication
Import as new
Insert
Leave existing
Relationships:
AUTHOR
Records matched to an existing publication with a manual record [1]
1. JOURNAL ARTICLE Complexified dynamical systems
C M Bender; D D Holm; D W Hook
This record has been matched with an existing publication
Import as new
Overwrite existing
Leave existing
Relationships:
AUTHOR
Clear
Import

Records matched to an existing publication without a manual record

For records that match an existing publication which has only online database records, you have three choices:

- **Import as new**: added as a new publication
- **Insert**: added as a manual record
- **Leave existing**: not added

Records matched to an existing publication with a manual record

For records that match an existing publication with a manual record, you have three choices::

- **Import as new**: added as a new publication
- **Overwrite existing**: replaces the manual record
- **Leave existing**: not added

Choose the option you prefer for each publication then click on 'import' to finish the process.

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6. Search Settings

6.1 INITIAL SEARCH SETTINGS

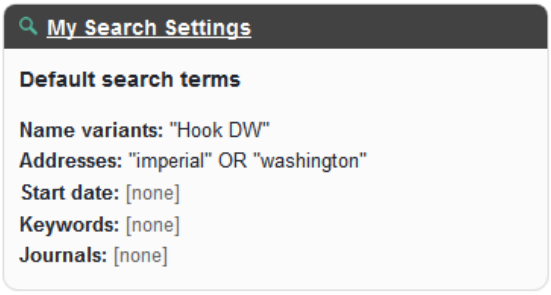
Elements uses a series of personal search terms to look for your publications in the online databases. Your initial search settings will be displayed on the home screen.

My Search Settings

The default search settings will depend on the configuration of *Elements* at your institution.

Usually, the initial default search settings will include your name with initial(s) and may also include address terms related to your institution.

Addresses are often injected into search settings if users surnames are considered common according to the US census.



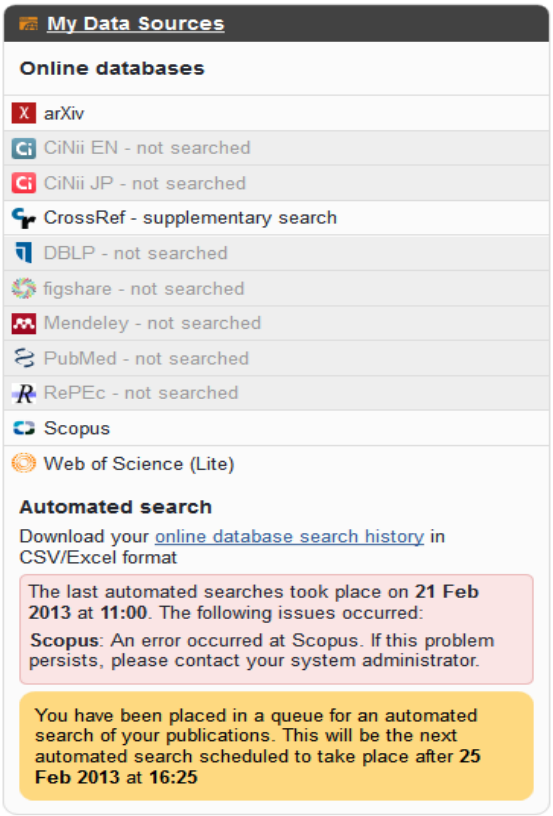
My Data Sources

The default data sources will depend on the configuration of *Elements* at your institution.

Usually, the initial default online databases will include ones that are pertinent to your field of study. *Elements* is currently searching the following sources:

- arXiv
- CiNii
- CrossRef
- DBLP
- fig**share**
- Mendeley
- PubMed
- RePEc
- Scopus
- Web of Science

Details of your most recent automated search is displayed together with a link to your **online database search history**.


My Data Sources
Online databases
arXiv
CiNii EN - not searched
CiNii JP - not searched
CrossRef - supplementary search
DBLP - not searched
figshare - not searched
Mendeley - not searched
PubMed - not searched
RePEc - not searched
Scopus
Web of Science (Lite)
Automated search
Download your online database search history in CSV/Excel format
The last automated searches took place on 21 Feb 2013 at 11:00. The following issues occurred:
Scopus: An error occurred at Scopus. If this problem persists, please contact your system administrator.
You have been placed in a queue for an automated search of your publications. This will be the next automated search scheduled to take place after 25 Feb 2013 at 16:25

6.2 MODIFY SEARCH SETTINGS

If you find that the system does not identify all your publications, you should amend your search terms.

When you save new search terms, you will be placed in the queue for the next online search (which usually happens every hour).

Advice for each category of search terms is given below. The automatic search of the online databases will take the following general form:

> (name OR name) AND (start date) AND (keyword OR keyword) AND (address OR address) AND (journal OR journal)

Removing a category of search terms will make the search less restrictive, while removing terms within categories will make the search more restrictive.

NB: Be cautious when adding new categories of search terms - this may cause the system to miss publications.

Name variants

The name variant used initially will be derived from your entry in your institution's HR feed to the system, but this may not be the form you always use when you publish.

You should add all combinations of your name and initials under which you publish, and the system will search for each one in turn.

Addresses

If your surname is relatively common (according to international census data), the system will automatically include a set of address terms relating to your institution, in order to constrain the search.

You can add other institutions, and the system will search for each one in turn.

Start date

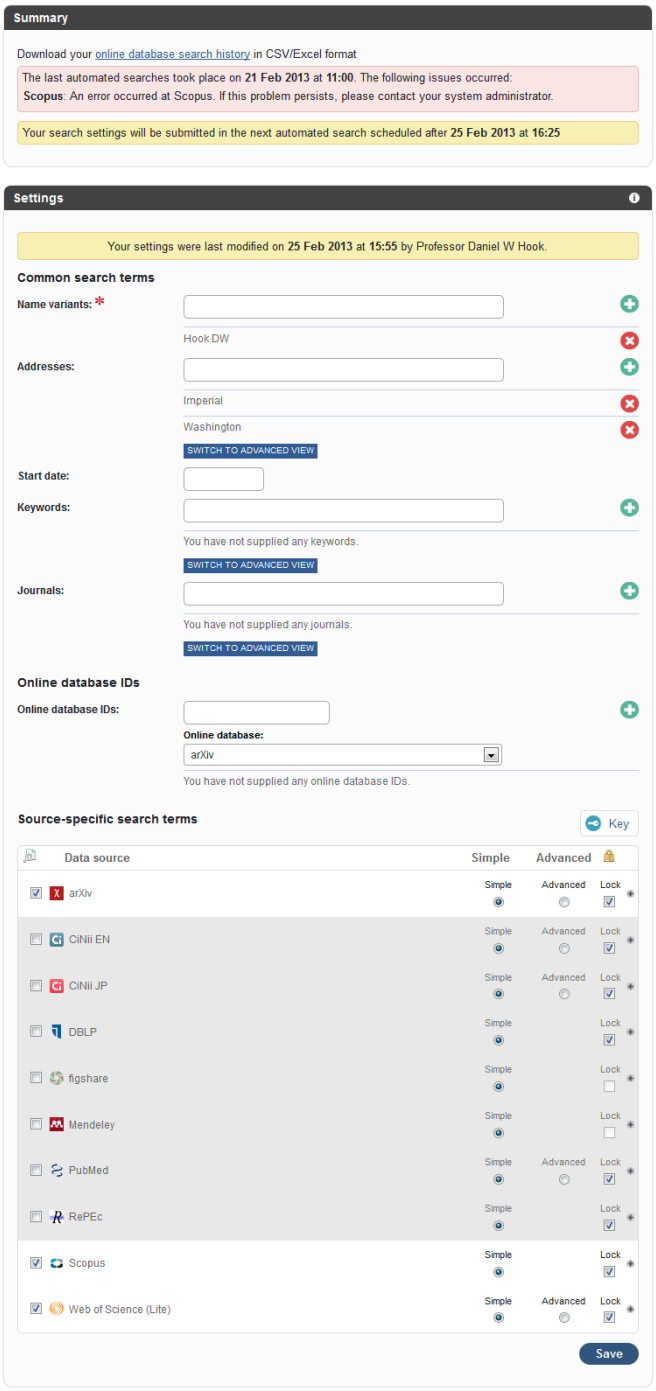
A start date is usually not included by default, but if you wish to restrict the search to run from a certain date, enter this here.

Keywords

Keywords are not used by default but, if you find you have a namesake in another field of work, adding keywords may help to exclude their publications from your search results.

Journals

If you know that your publications are restricted to just a few journals and wish to exclude any others, enter the journal names, using the official abbreviations for the online databases.



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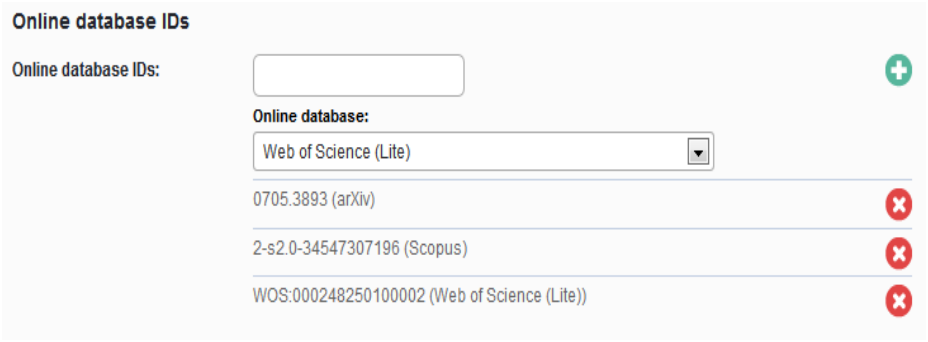
Find a specific publication online

In some circumstances you will not want to amend your search terms permanently to find just one particular publication.

For example, you may be publishing outside your field due to a temporary collaboration, and may not want to have to decline a wide range of articles by others in that field in order to find a handful of your papers.

In these cases, you can find a specific publication by the proprietary ID (unique) used within the online data sources.

If you enter an ID number in this way, the paper will be downloaded during the next scheduled search and will be found in your list of pending publications.

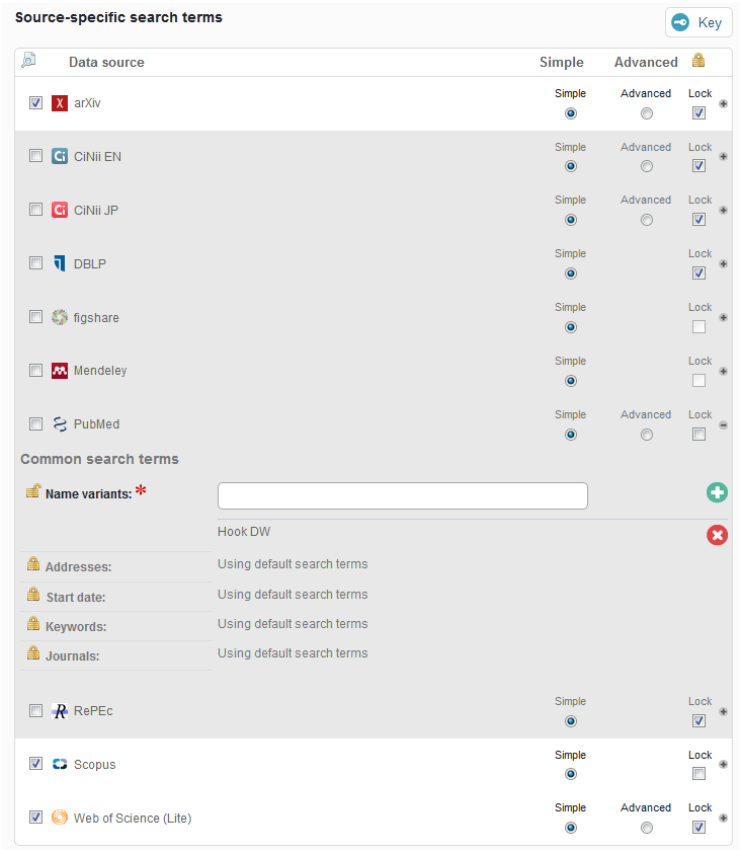


Set source-specific search terms

By default, each database uses the **Common search terms**. However, you can override these by setting specific search terms can be set for each online database.

To change these for a database, click on the padlock icon to separate it from the default settings, then make changes to the search terms for the database.

You can also add any database-specific terms (e.g. a subject category for arXiv).



7. Explore

The **Explore** area of *Elements* allows you to search for specific content; save searches and browse recent publications within your institution.

7.1 SYSTEM SEARCH

Enter keywords, names, phrases or a wildcard (*) to search the *Elements* system:

- **keyword:** single word such as 'hamiltonian'
- **phrase:** group of words in double quotes, such as "quantum effects"

In the advanced mode of the *Elements* system search you can restrict the search further by setting dates and choosing which elements to search for:

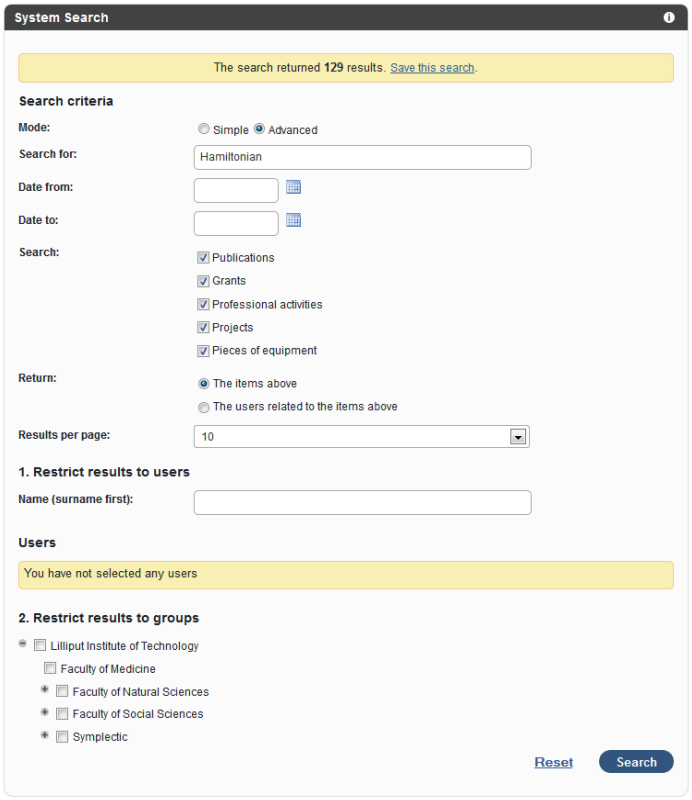
- Publications
- Grants
- Professional activities
- Projects
- Equipment

Note: available elements depends on the institutional configuration.

You can then choose to return either:

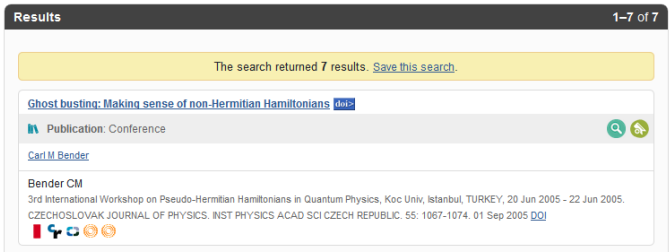
- **Elements** (specified above), or
- **Users** related to the elements (specified above)

Finally, you can restrict the *Elements* system search results to specific users or groups.



7.2 SEARCH RESULTS FOR ELEMENTS

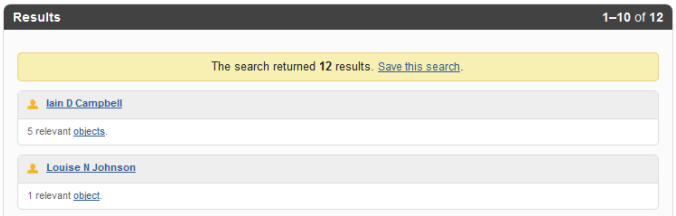
If you choose to view search results as **elements**, you will see a list of individual elements from the database, with links to institutional authors above each one:


Results
1–7 of 7
The search returned 7 results. Save this search.
Ghost busting: Making sense of non-Hermitian Hamiltonians
Publication: Conference
Carl M Bender
Bender CM
3rd International Workshop on Pseudo-Hermitian Hamiltonians in Quantum Physics, Koc Univ, Istanbul, TURKEY, 20 Jun 2005 - 22 Jun 2005.
CZECHOSLOVAK JOURNAL OF PHYSICS. INST PHYSICS ACAD SCI CZECH REPUBLIC. 55: 1067-1074. 01 Sep 2005 DOI

Click on the author names and you can view their full profiles, including a list of their other collaborators in your institution.

7.3 SEARCH RESULTS FOR USERS

If you choose to view search results as **users**, you will see a list of colleagues from your institution who have one or more elements that match your search query:



Click on a name to view a colleague's profile, including all their publications and other elements.

Alternatively, click on the link below their name to view only their elements.

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7.4 SAVED SEARCHES

You can save the terms used for a search of the database, so that they can be used again without typing in all the details of the query.

To save a search, click on the link ‘save this search’ at the top of the list of results.

You will need to give the search a name, and then save it. Afterwards, you can access your saved searches via **Saved Searches** link in the **Explore** sitemap.

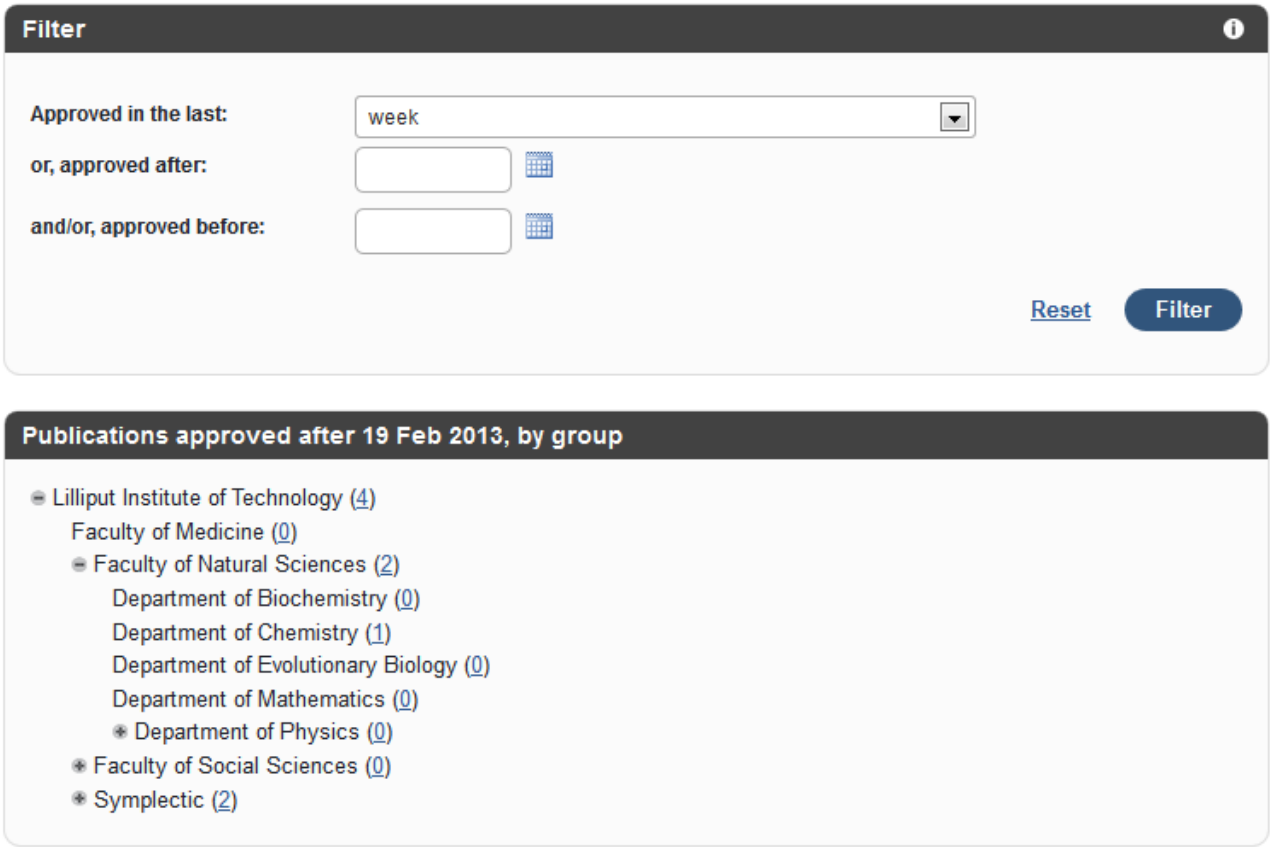
7.5 RECENT PUBLICATIONS

Click on **Recent Publications** in the **Explore** sitemap to see details of publications that have been added to the database recently.

Filter on a specific approval period (week, 2 weeks, month, 3 months) or a specific date range to restrict the set of recent publications.

The results are displayed in an organisation tree in the bottom half of the screen. For each group within your institution, the number of recent publications will be shown in brackets after the name of the group.

Click on the number to see the list of publications. As with search results, the names of authors are also interactive links, enabling you to explore other publications from the authors.



8. Managing Relationships

Elements gives you the ability to create relationships (links) between the different aspects of your research:

- Publications
- Grants
- Professional activities
- Projects
- Equipment

8.1 ADDING NEW RELATIONSHIPS

All your elements (Publications, Grants etc.) have relationships to other elements or users in the system.

Existing relationships are listed on the **Relationships** tab of the summary view and under the **Connections to Other People and Elements** on the full detail view.

When adding new relationships, you have to

- **Choose a category:** the type of element you want to link to
- **Choose link type:** the type of link you want to this element

Suggested elements will be listed if you already have links to them. Otherwise, you can search for elements at the bottom of the screen.

Please see below for the available relationships that can be made between elements.

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8.2 RELATIONSHIP TYPES

The table below lists all the possible relationships between elements. You only need to add each relationship in one 'direction' as the system will add the reciprocal relationship automatically.

Element 1	Element 2	Link	Inverse Link
User	Equipment	Trained on	Training obtained by
User	Grant	Primary investigator	Investigated by (primary)
User	Grant	Secondary investigator	Investigated by (secondary)
User	Project	Administrator of	Administered by
User	Project	Project manager of	Managed by
User	Project	Project champion of	Championed by
User	Project	Project leader of	Lead by
User	Project	Team member of	Has member
User	Project	Researcher on	Has researcher
User	User	PhD supervisor (primary) of	PhD supervised (primary) by
User	User	Manager of	Managed by
User	User	PhD supervisor (secondary) of	PhD supervised (secondary) by
User	User	PA to	Has PA
User	User	MSc student of	Has MSc student
User	User	Project student of	Has project student
User	User	Collaborator of	Collaborator of
Publication	Professional Activity	Associated with	Associated with
Publication	Equipment	Derivative of	Derives
Publication	Grant	Funded by	Funds
Publication	Project	Derivative of	Derives
Publication	Publication	Derivative of	Derives
Publication	User	Authored by	Author of
Publication	User	Edited by	Editor of
Publication	User	Translated by	Translator of
Project	Equipment	Owner of	Owned by
Project	Project	Precursor of	Successor of
Project	User	Funder of	Funded by
Professional Activity	Professional Activity	Associated with	Associated with
Professional Activity	Equipment	Associated with	Associated with
Professional Activity	Project	Associated with	Associated with
Professional Activity	User	Associated with	Associated with
Grant	Professional Activity	Funder of	Funded by
Grant	Equipment	Funder of	Funded by
Grant	Grant	Precursor of	Successor of
Grant	Project	Funder of	Funded by
Grant	User	Funder of	Funded by
Equipment	Equipment	Derivative of	Derives
Equipment	User	Used by	User of
Equipment	User	Has team member	Member of team
Equipment	User	Has maintainer	Maintainer of
Equipment	User	Has manager	Manager of

9. Delegating and Impersonating

9.1 ADD A DELEGATE

You can delegate the rights to edit your records to an assistant or other member of staff.

Simply log into the system and click on **Account Settings** in the header menu, then add the appropriate delegate(s).

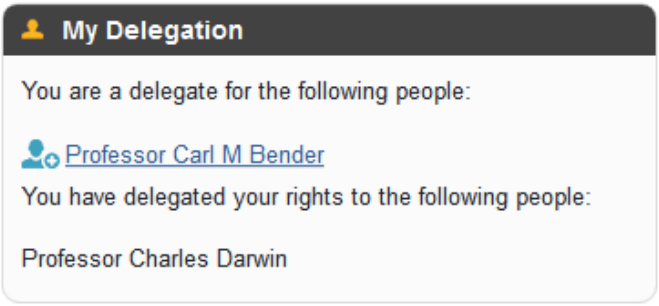
Type the delegate's surname in the **Name** box, select the correct person and click on the 'plus' sign, before saving.

Your delegate will now be able to log into the system using their own username and password, then click on 'impersonate' on their home screen to access your details.

All members of your institution's staff, including non-academic staff, should appear on the drop-down list. If your chosen delegate does not appear, check with your institution's *Elements* administrator.

9.2 IMPERSONATE ANOTHER USER

If you have been given the right to act as a delegate for another user, you will see the **Impersonate Another User** option in the header menu.


My Delegation
You are a delegate for the following people:
Professor Carl M Bender
You have delegated your rights to the following people:
Professor Charles Darwin

This takes you to a screen listing all the users for whom you can act as a delegate. Unless you are an administrator for a large group, this will normally be only one or two other users.

Find the user you are a delegate for and click on their name. The options in all the menus will now relate to this user's records, and the system will show their name at the top of the screen.

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